Organization Information and Organization-based Workflow Notes

Organization:

_____

_____

Department Name	Location Name	Default Bill to Address	Default Ship To Address	Default Purchaser by Location (specify if your organization makes purchases by location)	Primary and Alternate Approver for Department or Location (if needed)	Other Addresses needed by this Department

Add staff names for each training:

Organization Administrator Training

approval and workflow requirements and user profile set-up activities. Organization Administrators will be instructed on the

Last Name	First Name	Title	Agency Name	Agency Address	Agency City/State	Phone	Email

Purchasing from Statewide Contract Training

This course will cover all aspects of purchasing goods and services from Statewide Contracts. This course is necessary for all who require a general introduction and orientation to COMMBUYS: to search contracts, create and track requisitions, and process purchase orders. Anyone involved in purchasing from Statewide and/or Departmental Contracts should attend this course. At the conclusion of this course each attendee will be able to complete basic navigation within COMMBUYS, be able to identify and understand key terminology, be able to create requisitions, create Purchase Orders and track the purchasing cycle. This course will also enable attendees to use the Advanced Search Features to locate contracts and vendors, input addresses, attachments, reminders and notes.

Last Name	First Name	Title	Agency Name	Agency Address	Agency City/State	Phone	Email

This course is designed for procurement officers and those who are involved in the processing of soliciting goods or services not available on a Statewide Contract to successfully conduct all facets of the procurement process including: solicitations (bids), development, solicitation amendments, online bid evaluation, contract award, and posting awarded contracts online within in COMMBUYS. The course will include creating a solicitation/bid, evaluating a bid using the online evaluation tool, awarding a bid and creating and posting a contract.

Last Name	First Name	Title		Address	City/State	Phone	Email

Worksheet: List Departmental Contracts Planned with a start date of 2/1/14 through 5/24/14

Contract Name	Goods/Services Provided	Contract Start Date	Contract End Date	Contract Coordinato	Coordinator Contact Info
Worksheet: List SWC Planned to use during last fiscl quarter of FY 14					

Contract Name	Goods/Services Provided				

Worksheet: List current department contracts that need to remain in use through the COMMBUYS transition

Contract Name	Provided				

Worksheet :Identify Approval Paths

Document Type	Types	Name of 1st Approver	Name of 2nd Approver	Name of 3rd
A Requisition enable Basic Purchasing and Department Access users to initiate the purchasing process. Users complete Requisitions by designating the requisition type, adding items, and indicating ship-to and bill-to addresses and accounting information.			`	
	Open Market requisitions provide Department Access users with the ability to create requests for products/services that do not exist on agency contracts. The user must define the			
	Direct Open Market requisitions provide a Department Access user with the ability to create requests for products/ services that do not exist on agency contracts and to send			

	Direct Open Market requisitions provide a Department Access user with the ability to create requests for products/ services that do not exist on agency contracts and to send			
	Release provide an ordering method for products/services currently on-contract. Standard Releases must route through Purchasing before being sent to the vendor.			
	RPA (Requests for Payment Authorization) in Commbuys are used to request funds for a product that has already been purchased, or services that have already been provided.			

Bid documents enable Basic Purchasing users to conduct solicitations. Users complete Bids by defining the solicitation process to be used, indicating the relevant dates, creating the item(s) that can be bid upon, identifying vendors to notify, and attaching the appropriate terms, conditions, instructions, etc. Once approved, Bids can be published on the web to enable electronic response by registered vendors. After the response time has ended, Bid responses can be viewed, evaluated and awarded via the Bid Tab.			
	Open Bids are those that allow any vendor to submit a response, even those not originally notified of		
	Closed Bids are visible only to those vendors originally notified of the Bid upon		

	Formal Bids prohibit Basic Purchasing users from viewing any submitted responses until the Opening Date/Time has been			
	Informal Bids marked as Informal allow Basic Purchasing users to view vendor			
Quote documents are the				
Purchase Order(PO)				
	Open Market POs			
	Blanket POs capture			
	Contract POs capture			
	Change Order			

Assign CB roles to staff in your Agency that require access to system: Inquiry   Department Access   Basic Purchaser (See Section 4 in Workbook for role

ORG_ID	MMARS Code	Organization Name	FIRST_NAME	LAST_NAME	JOB_TITLE	EMAIL_ADDRESS	PHONE_NUMBER	Assign COMMBUYS User